

CTED Telephone Support:
360.725.3071

ATTACHMENT B - Quick Reference Card

Step 1 : Installation & Saving

Templates

- Save entire CD contents to the root directory of the C: drive.
- Retain default directory structure.

Macros

- Load the “Personal” file to C:/Documents and Settings/*your user name*/Application Data/Microsoft/Excel/XLSTART.

Tools

- Set-up the Macro toolbar using Tools ⇒ Macros, then select the “Toolbar” listing and click “Run” to launch temporary toolbar.
- Close all Visual Basic screens opened by the tool.
- Assign macros and names to the toolbar buttons (see Page 5 of Guide).

Saving Files

- Save files to C:/CFP Tools and Templates/CFP Individual Projects/Desired Program Area.

Step 2 : Table of Files

- Enter each template through the “Table of Files” button (second to last) on the special toolbar.

Step 3 : Preliminary Planning

CFP Process Task List & Flowchart

- Step-by-step list/visual flowchart of entire CFP process.
- City Owned Property Matrix**
- Complete listing of properties owned by a jurisdiction.

Microsoft Excel - CITY PROPERTY 5.7.01 [Read Only]									
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Public Works Project Profile

- Form used to document information about each Public Works project.

Comprehensive Plan Policies Matrix

- A tool for matching Comp Plan policies to various properties.

[illegible]

Documentation Matrix

- Documents information related to impact studies and planning activities associated with any CFP project.

Decision Matrix

- Prioritizes projects according to levels of criteria for determining their status in the CFP.
- Edit criteria as needed and enter data for each project.
- Go to the background tab to see point values for criteria selected.
- Click the “Blanks” button on the CFP1 toolbar to calculate totals for each project.

[illegible]

Step 4 : Project Scoping & Estimating

Project Plan

- Includes several worksheets used for tracking types of employees and costs, as well as construction close-out resources.

Construction Planning Matrix

- Used for scheduling each project phase and the various components.

Scoping Worksheet

- Used for identification of potential project problems.

Land and ROW Matrix

- Used for determining project land and employee costs.

Permit Matrix

- Used for documenting project permits.

Public Communications Matrix

- Used for developing a public communications plan for each project.

CFP Project Components

- Create one for each project in your plan.
- Enter project name, size (required), contingency rate, and tax status.
- Place correspondeing “x’s” in column A.
- Switch to “Estimate Worksheet” and fill in quantities in column G.
- Filter column A for “x.”
- Save a completed template for each project.

PROJECT COMPONENTS AND DEFINITIONS	COMPONENT NAME	BID TAB	LINKS TO EST. WKSH
Administrative - Steps not directly related to design of a specific component (ALWAYS leave 'x' in box)	Administrative		x
PACKAGES - Combine a number of components to create shortcut estimates for common projects. Use ONLY when you already know specific bid tab items. Otherwise, select the individual components below.			
Basic project component - Includes selected items from many types of roadway projects, e.g., single overlay, widening with or without excavation, walls, plantings, pavement markers (including striping), and permanent signage	General Requirements	100	x
General stormwater installation - Can be a stand-alone project but usually needed for roadway widening projects or in conjunction with a sidewalk project	General Stormwater Ins	100	
Roadway appurtenances - Curb and sidewalk, ribbon sidewalk, and temporary asphalt sidewalk, mid-block access ramps, intersection access ramps, double access ramps, bulb-outs, median islands	Roadway Appurtenances	100	
Traffic signals and illumination - Includes ornamental lighting, traffic signals, in-pavement lighted signals, and illumination	Signals & Illumination	100	
General water system installation - Watermain replacement and installation, telemetry, lift booster stations installation	General Water Install	100	
General sewer installation - Sewer main, manhole, side sewer, and cleanouts replacement and installation. Pipe lining is also included	General Sewer Install	100	
Reservoir demolition, build, and repair - Demolition and removal; vault and tank installation; repair, disinfection, and repainting; and miscellaneous installs	Reservoir Build/Repair	100	

CFP Project Costs

- Combines all project costs, formatting them into a series of worksheets suitable for presenting.
- Output documents include project costs for previous and current planning periods.
- Only green cells can be edited.

Step 5 : Document Prep

- Templates used to create CFP text files.
- Samples documents include “Table of Contents,” ‘Introduction’ and ‘New and Completed’ for each of the nine program subsections.
- Table grids inside the documents will import data from project worksheets when double-clicked.
- Titles also pre-fill when double-clicked.

Step 6 : Project Management

- Section includes many duplicate templates.
- Project Scorecard worksheets are project field tracking tools and include individual and team versions.